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ABSTRACT

This document contains four symposium papers on contextual learning issues. "Learning to Learn Strategies of Successful Real Estate Professionals: Implications for Learning in the Workplace" (Margot B. Weinstein) describes a multicase study in which a model called the Individual Learning System was used to identify the strategies and resources three successful real estate professionals use to learn and the type of organization, teaching competencies, and programs that professionals need to prevent professional obsolescence in the workplace. "Vital Work: Spirit and Development within the Natural Workplace" (Terri A. Deems) is a study of two organizations where development has become a way of conducting work as a whole rather than a function of training. "Action Learning as a Strategy for Inducing Psychological, Cultural, and Organizational Boundarylessness" (Verna L. Willis, Robert L. Dilworth) argues that psychological, cultural, and organizational boundarylessness yields a competitive advantage to corporations and a potential humanitarian advantage in the new global economy. "Contextual Learning of Owner-Managers of Small, Successful Romanian Companies" (Maria Cseh) examines the critical learning experiences that enabled owner-managers of Romanian small private companies to make a successful transition to a free market economy. (MN)

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Learning to Learn Strategies of Successful Real Estate Professionals: Implications for Learning in the Workplace

Margot B. Weinstein
Kingston Group, Inc.

This paper describes a multi-case study of how three successful real estate professionals learn to learn by using a model of the "Individual Learning System." This model adds to the concept developed by Robert Smith (1982; 1990). The professionals describe the strategies and resources they utilize to learn, and the type of organization, teaching competencies, and programs that professionals need to prevent professional obsolescence in the workplace.

Keywords: Learning, Professionals, Instruction

Constant changes in society and in technology will continue to create turbulent environments in the workplaces of the future. John Kotter (1995), professor of leadership at Harvard Business School, stated that it is essential for workers to aggressively seek learning opportunities at work to maintain job satisfaction and to ensure their employability in the turbulent economic environment of the 21st century. However, there is still a tremendous debate on how adults learn best in most professions. Professionals make up more than 27 percent of the current workforce in America, and they have a high degree of control and influence in the lives of people in society, Cervero, 1988. A real estate professional is a person "who is licensed by the state in which he/she practices, and abides by the code of ethics of the National Association of Realtors® (NAR) as well as all governmental laws" (NAR 's Membership Profile, 1996). Although several studies had been conducted during the last 20 years on how professionals learn and how to educate them for their practice in American society (Houle, 1980; Cervero, 1988; Curry, Wergin & Associates, 1993; Schon, 1983, 1987), until this research study, there was minimal research that had asked real estate professionals how they learn and how that information could be used to design training and education to aid them in keeping up to date with new information (Pajor, 1985; Sirmans & Sirmans, 1992; Chicago Association of REALTORS®, 1995). This study examined how professionals learn and what type of organizations, teachers, and programs are needed to enhance their learning in the workplace.

Theoretical Framework

The research study focused on the work of the late scholar Robert M. Smith. Dr. Smith wrote seven books and numerous articles on the topic of learning to learn. He developed learning to learn as an applied theory which he defined as the process by which people "possess or acquire the knowledge and skill to learn effectively in whatever learning situation one encounters" (Smith, 1982, p. 19). Smith's writings contain a comprehensive resource of all the literature, research, and theory on the subject of how children and adults of all ages learn in a variety of settings from classrooms to employee training workshops. Smith explored the subject through the works of several leading experts in the field (e.g. Tough, 1979; Erikson, 1968; Knowles, 1980; Cervero, 1988; Schlossberg, 1984; Schon, 1983; 1987). Smith used the information to design a course on learning to learn which he taught for many years at Northern Illinois University. This study advanced his theory by conducting research in the context of real estate. The themes that emerged supported Dr. Smith's assertion that learning to learn is context bound, and that it can vary /considerably from one context to another.

Research Questions

This research study attempted to answer four research questions:
1. How do successful professionals learn to recognize and react to complexities in their field?
2. What learning strategies do successful professionals apply to stay competitive in the profession?
3. How do successful professionals utilize resources as learners?
4. How might continuing professional education enhance the development of these learning strategies?

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Method

The qualitative research methodology of interpretive case study was used for the research because an intensive description and analysis of the phenomenon would uncover the interplay of significant factors that are characteristic of the phenomenon (Merriam & Simpson, 1995).

Participants

Exemplar real estate professionals were purposely selected based on Yin's (1994) definition of an exemplar case and the definition of a successful professional by NAR's (1996) Membership Profile." Each respondent worked in one of the three major areas of real estate: residential sales, property management, and appraisal. Ruth L. Theobald was vice president and director of property management of Affiliated Capital Corporation in Wisconsin. Phyllis Kendall Rosen was the managing broker for the Highland Park office of the Prudential Burnet Realty, a residential real estate sales office located in Highland Park, Illinois. Myron J. Evanich, Ph.D., was director of Valuation Management Consultants, Inc., an appraisal company located in Chicago, Illinois. The first two of the respondents were women, and the third was a man. The ages of the respondents ranged from mid-40s to 60 years old. The respondents had practiced a minimum of 12 years in the business. The respondents had attended college; one had an associate's degree, and one had a Ph.D. All three had real estate licenses as well as several other memberships and designations in real estate. The respondents worked full-time in the real estate business. All respondents trained professionals, and two of the respondents also were certified teachers in their field to teach continuing education (CE) in real estate. CE is defined as real estate oriented educational sessions or courses intended to improve the skills of licensees, to keep licensees abreast of changing real estate practices and laws, and to help licensees meet the government imposed educational requirements for license renewal (National Association of Realtors® Task Force, 1978). The three respondents regularly took CE courses, and two of the three respondents published in their field.

Procedure

The researcher studied the respondents for nine months. Standardization was obtained by taping one formal interview with each respondent using questions that were designed in advance, and all respondents were asked the questions in exactly the same sequence and manner (Richardson, Dohrenwend, & Klein, 1965).

In order to examine the data from the formal interviews, tables were designed to display the data, and quotations from interviewees and further explanation were presented by the researcher as needed to explain the data. The characteristics that emerged from these in-depth interviews were validated through review of tapes, transcriptions, and field notes of the interviews. The researcher contacted the respondents several times during this study as well as reviewed all published information about their companies and themselves in order to obtain accurate information. The respondents also received copies of the final transcribed tapes and edited any personal information that they did not want in the final case study. The information was further validated through documents, journals, literature review, and discussions with other professionals and educators in the field.

After the completion of the data analysis process, another phase of data analysis, a search for themes, was begun. The process used "concept mapping" (Smith, 1990) as a diagnostic tool. "A concept map depicts in a diagrammatic form, ideas, examples, relationships, and implications about a particular concept. The center or core idea is placed at the center or top of the page, and radiating from it are a number of spokes or lines leading to other concepts related to, or indicated of the central idea" (Smith, 1990, p. 49). Concept mapping enabled the researcher to group similar examples of large concepts together, and smaller concepts were set aside until they could be integrated into the larger themes; this process allowed the dominant themes to emerge from the data. The similarity of the process of the information gained in the case studies made possible the rich, descriptive data needed to interpret the phenomenon being investigated as explained by Merriam (1988).

Results and Findings

The findings suggest support for all four research questions. The real estate professionals were able to present similar information about how they learn to learn, and how organizations, programs, and teachers should provide education and training in order to aid their ability to learn in the workplace.

Six Themes

Because of their nearly identical stories, six themes emerged from the research study. The first three themes were related to the learner: (a) the procedure the learners develop to learn to learn, (b) the strategies the learners utilize to learn, and (c) the resources they employ for successes. The second three themes are related to organizations that provided CE for these professionals: (a) working in open/learning-system organizations, (b) training of educators, and (c) developing improved programs. These six themes will be explained below.

Theme 1 - Systems Learning Model. The learning to learn process of the real estate professionals who were interviewed in this study operated as a model of an "Individual Learning System." The professionals described how they used all knowledge gained through their life experiences, strategies, resources, and other professionals to improve learning in each learning situation. The professionals used a model of learning that was always in motion, evolving, changing, reflecting, evaluating, and improving. The model was developed through understanding the three aspects of these professionals: (a) the procedure they employ to learn to learn, (b) the ability to improve their learning strategies to relate to the complexity of the context and environment of their business, and (c) the personal characteristics of the learners that enable them to adapt in all learning situations.

The individual learner operates as a general open system model in the same manner as described by Senge (1990) that workers learn in learning organizations. Open systems recognize that biological or social systems have a dynamic relationship with their environment. An open system adapts to its environment by changing the structure and processes of its internal components. The systems approach is conceptualized as a series of inputs that, when acted upon by a transformation process, results in certain outputs. The learner is in continual interaction with his/her environment and therefore achieves a "steady state" or dynamic equilibrium as he/she retains the capacity for work or energy transformation. Therefore, the learner's survival in the competitive business world depends on his/her ability to operate as a dynamic, open, "system." The learner must continually improve and adapt to new learning situations by incorporating everything he/she learns into his/her business life, personal life, and in society into the process of learning. Every day, professionals must adapt to the changing context of their workplace, the environment, and their personal characteristics as learners.

Although the procedure of learning to learn remained the same for all three professionals, the information led to the understanding that each learner is also unique. The professionals described how they learned differently based on their gender, age, culture, life experiences, and life transitions. The information supported research by several authors (Belenky, Chinchy, Goldberger, & Tarule, 1986; Erikson, 1968; Gilligan, 1982; Schlossberg, 1984, and others). The process involves a holistic model instead of a linear approach to learning, and it leads to new understanding of how real estate professionals learn to learn. The professionals were further able to explain how their differences should be interpreted to design more effective organizations and education programs for their professionals.

Theme 2 - Strategies for Learning. The respondents in this study explained 14 strategies that enabled them to stay competitive in the profession: using self-awareness, self-monitoring, reflection, reflection-in-action, self-direction, lifelong learning, expertise, networking, interpersonal skills, personal motivation, innovation, collaboration, technology and a 7-step continuous problem-solving model. In the literature review, several authors described similar problem-solving processes (e.g., Dewey, 1933; Lewin, 1948; Argyris & Schon, 1974; Schon, 1983, 1987; Kolb, 1984; Meyers; 1986; Redding & Catalanello, 1994):

Problem-solving Model. The seven steps in the continuous-action problem-solving model are:

1. Conceptualize plan in his/her head by reflecting on previous similar experiences;
2. Set down the problem on paper in a tentative plan of action;
3. Gather data: talk to professionals, read, etc.;
4. Analyze alternative approaches;
5. Develop more complete plan by redesigning plan to reflect new insight;
6. Act on plan; and
7. Evaluate results based on consequences of outcomes of action.

The professional continues through the process to reflect and refine the plan as new information on the problem is gathered. Professionals may continue to go through the entire process several times, or they may use only one or two steps to update the plan. The professionals used reflection continually throughout the problem-solving process. They stated that their problems involved cycles of problem solving because they seldom solved their problems in one or two cycles. They use iterations or cycles to solve their problems such as explained by Arygyris and Schon (1974, 1978), Schon (1983; 1987) and Redding and Catalanello (1994). However, this model

is comprised of more steps than most problem-solving models in the literature, because the professionals explained that their problems are usually complex, and take a longer period to solve than in many other businesses.

Theme 3 - Resources for Learning. The respondents stated that they used six major resources to learn: mentors, experts, professional associations, technology, relationships, and supportive organizations.

Three Themes to Enhance Education and Training

Three themes were suggested by the respondents that related to enhancing education programs for professionals: (a) organizations that provide CE need to operate as "TQM Learning Organizations," (b) organizations need to improve training of teachers, and (c) organizations need to improve CE programs for professionals.

Theme 4 - TQM Learning Organization. In order for professional organizations to respond to the needs of professionals, their customers, and the public, respondents suggested that organizations should be designed utilizing the ideas and strategies of a TQM Learning Organization described by Deming (1986) with the model of the "open organizational learning system" discussed by many writers (Redding & Catalanello, 1994; Senge, 1990; Senge, Kleiner, Roberts, Ross, & Smith, 1994; Watkins & Marsick, 1993; Weisbord, 1990).

TQM is defined as a company that holds its primary philosophy as to provide total customer satisfaction. To accomplish its goals , the company embraces all strategies, tools, management techniques, and planning activity that embraces the philosophy of providing the best products and services to the customer, Deming (1986). While a learning organization is defined as one where all the individuals within the organization work together across boundaries to solve problems. A learning organization must involve: (1) systems thinking, (2) personal mastery, (3) mental models, (4) shared vision, and (5) team acquisition of knowledge as described by Senge, 1990. Respondents were able to articulate the importance for organizations to embrace all aspects of both concepts discussed above.

Theme 5- Competencies Needed by Educators. The Fifth theme illustrated the need to improve the training of educators who provide CE to professionals:

1. Educators must also be practicing professionals who understand the business.
2. Educators should be competent in teaching. They must understand the needs, characteristics, motivations, diversity, and disabilities of students. They must be able to use a variety of teaching methods (e.g. technology, lap computers, dialog), and they should use evaluations effectively to obtain feedback from students.

Theme 6 - Education and training programs. The sixth theme explained ways to develop improved programs for professionals:

1. Programs must provide relevant information for the level of expertise and area of practice of professionals.
2. Programs should order courses in different levels (e.g. beginning, intermediate, advanced).
3. Courses should be divided into modules when material is too long to be adequately covered in one session.
4. Courses should incorporate Case Studies.
5. Courses should have experts teaching subjects.
6. A wide variety of subjects should be offered (e.g. diversity, age, culture, and specialty areas such as appraising).
7. Subjects should be updated regularly.
8. Some courses should teach professionals how to use new technologies. Since real estate transactions went on the Internet in November of 1995, there is a tremendous need for professionals to learn to effectively adapt to use this technology.
9. Courses should be offered using a variety of delivery methods (e.g. distance education, home study, on-line computer, etc.).
10. Some courses should offer a practicum "hands on" experiences.
11. All courses should require participants to fill out evaluation forms of courses and instructors.
12. Courses should contain better assessment techniques in MCE to reflect practice instead of a test for relicensure.
13. All courses should be cost effective and timely.

Several recommendations for further research were made, the most important was to study the differences between how men and women learn in the real estate business.

Limitations

Since the study was limited to three case studies, the study can not attempt to predict successful learning styles of all real-estate professionals. Although the case studies lead to a deeper insights into the area of the study, findings from

case studies cannot be generalized in the same way as the findings from random samples. For this reason, this study should be the first step to lead to further research on the subject.

How this Research Contributes to New Knowledge in HRD

This research builds on an important theme in adult and higher education, and HRD-How do adults learn to learn in the workplace? Although significant research has been conducted in this area, the theoretical foundations of how professionals learn to learn in HRD remains an open field for research. The information supports and adds to the knowledge in the field in several ways: First, the study adds to the research by focusing on a sub-set of professionals, real estate professionals. The research provides a better understanding of how real estate professionals learn. This research could be duplicated by others to expand upon it to build more knowledge and understanding on the subject in other professional contexts.

Second, the research makes the connection that successful, licensed real estate professionals learn in the same manner as employees continue to learn in "learning organizations," and that the process they use to learn is a "systems approach." Professionals explained the process of learning is complex and adaptive to change; as a result, they learn in a more holistic fashion than former linear approaches to learning. HRD professionals need to expand their view of how professionals learn.

Third, the respondents are self-directed learners as discussed by Tough (1979) , Knowles (1980), and Smith (1982), and they learn differently based on their age, culture, life experiences, gender, and life transitions as described by Belenky et al. (1986), Erikson (1968), Schlossberg (1984), and Gilligan (1982). Therefore, HRD professionals must be flexible in designing programs that are responsive to the specific needs of their audiences. HRD processionals need to conduct more needs assessments, and ask professionals continually, before, during, and after programs, how to meet their needs, and how to make the information relevant to their particular context. HRD professionals should possess the ability to facilitate learning by using a wide variety of teaching methods. The information could lead to the development of more meaningful education and training for real estate, as well as, for other professionals.

Finally, organizations should be designed that combine the ideas and tools of the TQM learning organization by Deming (1986), with the ideas of the "learning organization" by Senge (1990). This organizational design would: (a) provide the best customer service, and (b) keep employees up to date with latest information and technologies. The TQM learning organization can provide a win-win atmosphere whereby HRD professionals can provide education and training that is responsive to the needs of all audiences involved.

Conclusions

The data from the research study established the connection between how real estate professionals learn and the type of organization, educators, and education programs that would support and enhance their learning in the workplace. The objective of the model outlined here is to provide a better understanding of how successful, licensed real estate professionals continue to learn using a "systems model." Based on this model, HRD professionals must be more responsive to the needs of their learners. How professionals learn in the workplace and what are their needs that would enhance their education-these are important themes in HRD. This paper addressed HRD's role in enhancing organizational design and education for real estate professionals. If future research replicates and supports these findings, the information will lead to a vision for the development of a more comprehensive educational programs for professionals.

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Vital Work: Spirit and Development Within the Natural Workplace

Terri A. Deems
DAI/WorkLife Design

What happens when we reframe work as a fundamental site of human development? This research explores two organizations where development becomes not a function of training but a way of conducting work as a whole. This study illuminates the lived experience of people who work within "natural" or "vital" workplaces. The educative function of the workplace is explored and principles for vital work are identified and defined.

Keywords: Organizational Development, Vital Work, Meaning-Making

Adults today spend more of their time and energy engaged in work than in any other wakeful activity; for the adult, work is the central domain for learning and for the development of our human capacity (Jarvis, 1992; Kincheloe, 1995; Watkins, 1991; Welton, 1991). Research presents a clear interrelationship between the structure of our work organizations and the psychological qualities and attitudes of the people who work within them (Balawajder & Popiolek, 1996; Mortimer, 1988; Pauchant, 1995; Riordan & Griffeth, 1995; Watkins, 1991; Williams et al, 1997); the everydayness of work serves as a context and source of learning and of self-knowledge. Work is, as Welton (1991) describes, a fundamental training site for a participatory and democratic society.

Such a perspective of the workplace moves beyond traditional ideas about the education and training of workers to enhance corporate profit. Rather, it brings us to consider the workplace itself as a curricular structure, an educative environment (Dewey, 1938) with the potential to stimulate or enhance, to restrict or distort, growth and development. Yet this educative function of work has been a largely neglected theme in the field of human resource development (HRD). In our efforts to ensure we are making "value-added" contributions to organizational performance, we risk losing sight of our field's tradition: to further the development of humans and to promote the growth and welfare of the larger society (Friedlander, 1996).

This research explores two organizations where development becomes not a function of training but a way of conducting work as a whole, and illuminates the lived experience within these environments. The educative function of the workplace is explored and principles for vital work are identified and defined.

The Organization of Work

Contemporary Workplace Reforms

We are experiencing today a pace, breadth, and depth of change unseen in any previous chapter in workplace development in the Western world. Innovations that emphasize the importance of learning and of personal and collective development can be seen in the emergence of less authoritative structures and more collaborative and democratic work processes (for example Briskin, 1996; Dew, 1997; Dirkx, 1996; Kofman & Senge, 1993; Marsick, 1987). Such efforts to reinvent the corporation depict a struggle to establish a vision of work founded on a more clearly articulated set of humanistic values and constructivist models (Aktouf, 1992; Dew, 1997; Dirkx, 1996; Meltzer & Wickert, 1976): shared rather than unilateral power; autonomous work groups; diversity rather than conformity. Within the margins of such change lies an implicit recognition of the interrelationship of the subjective life of the worker and the objective conditions of work (Aktouf, 1992; Watkins, 1991; Welton, 1991). Yet in spite of new reforms, technical-rational approaches to work continue to be the norm and reforms retain a distinct positivist flavor (Ketchum & Trist, 1992; Kincheloe, 1995; Pauchant, 1995). Reforms are appropriated or sanctioned in order to enhance worker quality, commitment, productivity, or morale. The extent to which such reforms add value to the organization is embedded almost exclusively within a capitalistic framework (Briskin, 1996; Dirkx, 1996; Morin, 1995). Contradictions and paradox exist. With increased democracy, there are increased surveillance technologies. With open sharing of information, heated debate over office Internet access. With increased participation, restrictions on cubicle "prairie-dogging."

The worker continues to be conceptualized as an object ruled by causes, whose subjective experience is separated from the objective conditions of the workplace (Watkins, 1991). Research indicates that such a fragmentation results in an experience of work which constricts and distorts, rather than enhances and enlarges the

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human spirit (Aktouf, 1992; Watkins, 1991; Welton, 1991). This constitutes a miseducative experience (Dewey, 1938), a "false and stunted humanism" (Aktouf, 1992, p. 412). The centrality of work in our lives is generally relegated to work's role in creating a preferred lifestyle and there is little regard or consideration for how people develop, what people learn, what they come to know, outside the confines of sanctioned training.

The Natural Workplace

Reframing work calls for more than innovative strategies subtly inserted within the Taylorist paradigm (Aktouf, 1992; Block, 1997). It calls for deeper questions concerning our assumptions about the nature of work, how work is structured and organized, even the very purpose and meaning of work itself. In contrast to contemporary reforms, a "natural," more fully human workplace is emerging that ceases to artificially create, manage, appropriate or control the experiences of others (Aktouf, 1992; Semler, 1993). Grounded in a developmental view of work, the natural workplace appears to restructure the workplace around fundamentally different social, psychological, and economic assumptions. Named as radically humanist, democratic, mindful, conscious, even spiritual or soulful, this way of work is conceptualized as passionate, creative, nurturing, socially just, and more fully human, where profit and market share become not the goal but the by-product of vital or right work (for example Adams, 1984; Aktouf, 1992; Briskin, 1996; Clark, 1967; Dew, 1997; Dirkx & Deems, 1996; Fox, 1994; Hawley, 1993; Kofman & Senge, 1993; Meltzer & Wickert, 1976; Wenger, 1996; Whyte, 1994).

This sense of a more authentic, more fully human workplace appears to be qualitatively different than many other workplace reforms. The natural workplace is grounded in a particular view of human nature, a view supported within diverse bodies of literature (for example Aktouf, 1992; Dewey, 1938; Egan, 1994; Fox, 1994; Handy, 1994; Hawley, 1993; Jarvis, 1992; Kincheloe, 1995; Kofman & Senge, 1993; Moore, 1991; Pauchant, 1995; Wilber, 1995; Whyte, 1994). Primary to this view are the ideas that humans are (a) endowed with consciousness, right judgment, and free will -- we are actively involved in our own becoming; (b) fundamentally defined by our community and relations with others; (c) innately drive towards development and transcendence; and (d) share a common need for partnership and connectedness, for self-expression, and for meaning and purpose. Natural workplaces appear to structure and organize work in a way that facilitates the expression of this nature.

A growing body of literature (for example Bolman & Deal, 1995; Briskin, 1996; Fox, 1994; Hawley, 1993; Kofman & Senge, 1993; Whyte, 1994) presents an impressive picture of how work might be experienced within such environments: as vital, nurturing the human quest to embrace life fully with animation, meaningfulness, and purpose. Most of this work, however, consists of anecdotal evidence from proud CEOs (for example Fishman, 1996; Melrose, 1995; Semler, 1993). A relatively small body of ethnographic or anthropological research into more humanized workplaces or work units (for example Balawajder & Popiolek, 1996; James, James & Ashe, 1990; Massarik, 1976; Riordan & Griffeth, 1995; Schneider, 1990) describe a culture of work that embraces highly self-directed, participatory practices, community building, opportunities for friendship, recognized contributions, trust, and respect for humanity. They depict a strong corporate consciousness manifest by organizational members' engagement in the active processing of information, awareness of individual and collective strengths and weaknesses, awareness of the full environment in which the organization exists, and awareness of the interdependency of its systems (for example Massarik, 1976).

The idea of the natural workplace has been developed conceptually by numerous scholars, and the testimony of organizational leaders presents a rich and thought-provoking picture of what work might be. Within existing representations, however, there is a continued emphasis on the *perception* of work rather than on the *experience* of work (Briskin, 1996). There remains a distinct lack of research which presents the lived experience of workers within these sites, and we can only speculate on the extent to which people themselves experience these workplaces in an educative way. The purpose of this study is to explore how people experience and make meaning of the natural workplace, to build on our understanding of the qualities and characteristics of such an environment, and to investigate ways in which the natural workplace may contribute to growth and development.

Research Questions and Significance to HRD

This study explores the lived experience of people within two organizations working to create more humanistic, natural workplaces. It focuses on the nature of work and how people experience and make meaning of work within these environments. The following questions guided this inquiry:

1) How do workers experience and make meaning of organizational life within the natural workplace?

2) How is the natural workplace structured and organized? What are the qualities and characteristics of such an environment?
3) How and what do people learn, of themselves and of others, within the natural workplace? In what ways does the natural workplace facilitate growth and development of the individual and group?

Significance of the Research Problem

Argyris (1976, p. 405) described, "If the validity of the concept of the organization is to survive, the new designs will have to raise the level of the quality of life within the system and genuinely value high-quality living as much as efficiency." Conceptualizing the workplace as a fundamental site of learning and development offers this opportunity by creating experiences where "the purposes, driving forces, culture, behavior standards and results are more closely aligned to human needs, aspirations, and potential" (Koch & Godden, 1996, p. 173). An on-going and direct concern of organizational leaders lies with the objective conditions within the workplace in which interactions take place. Growing interest in such concepts as quality of work life, organizational learning and transformation, and work as vocation or calling, demonstrate a new focus on the establishment of working conditions that will "awaken in the worker the desire to work together in a spirit of community, creative energy, and meaningful purpose" (Aktouf, 1992, p. 419). The human spirit at work may be understood less as an object to be improved and much more as a force for collective creativity and innovation.

Human resource development practitioners are called to look more deeply into the ways in which the environment nurtures experiences that lead to growth, and how to utilize the physical and social environments "so as to extract from them all that they have to contribute to building up experiences that are worth while" (Dewey, 1938, p. 40). There is little agreement, however, as to what this means in a real and concrete way. This study contributes to our understanding of the workplace as a site for personal and organizational development, and illuminates conditions of work which are most conducive to a vital workforce. Developmental aspects of work will enhance our knowledge base of learning in terms of sociocultural, tacit, and self-knowledge. This study also contributes to our understanding of adult learning within the context of work as informal and incidental.

Research Methods

To understand another's experience, and to gain insights into the context which surrounds this experience, is to understand how a person makes meaning of a phenomenon. Meaning-making is the interpretive aspect of cognition and perceptions and, by definition, it is phenomenological (James, James & Ashe, 1990, p. 42). This study is grounded in Husserl's concept of phenomenology (as in Holstein & Gubrium, 1994; Moustakas, 1994; Sinha, 1969) a method that allows us to understand the ways the experiential world is produced and experienced by its members (Holstein & Gubrium, 1994).

Two midwest organizations participated in this study, having met the criteria for working towards a more natural work environment. This criteria were established based on a review of literature concerned with humanizing work environments (for example Fox, 1994; Hawley, 1993; Pauchant, 1995), and included:

- high levels of autonomy (e.g., use of participatory and democratic work processes, lack of dress code, and the commitment of the organization to an individual's personal goals);
- tolerance for ambiguity (e.g., lack of an employee handbook or task-specific job descriptions);
- relatively high levels of trust (e.g., lack of detailed policy and procedures, open leave policies, self-reporting time records, or full disclosure of financial information concerning organizational status);
- non-competitive recognition of employee contributions such as profit sharing plans maintained by employees;
- evidence of concern for the "whole" person (e.g., health/wellness facilities or programs, encouragement of educational development, social activities, or flexible time-off policies); and
- minimal hierarchical structure and evidence of individual power based on earnings or job title (e.g., office space determined by need rather than level of position, lack of reserved parking spaces, or open access to designated organizational leaders).

From these sites 20 self-selected people, representing a diverse mix of age, educational levels, gender, and positions within the organizations, participated as co-researchers. Data was collected through multiple methods

including non-participant observation, document review, focus groups, unstructured field interviews, semi-structured interviews, and follow-up interviews. Information was recorded with the use of detailed field notes and audiorecordings. The participants/co-researchers also participated in the analysis and the writing of the findings through member checks and providing feedback to the primary researcher on the written narrative.

Data analysis consisted of three major stages (Moustakas, 1994): phenomenological reduction, imaginative variation, and synthesis of meanings and essences. Audiorecordings were transcribed verbatim and each transcript underwent a process of horizonalization, establishing meaning units and themes, development of individual textural and structural descriptions, and the synthesis of meanings and essences across cases. From this synthesis a composite textural-structural description was constructed, representing the shared essence of the work experience. The composite descriptions were presented to participants to ensure they represented an accurate and rich portrayal of their experiences and meaning-making within their workplaces. Accuracy and trustworthiness of the data (Lincoln & Guba, 1985) was ensured through on-going contact with participants, triangulation of data, member reviews, and peer review.

Findings: The Experience of Work

Findings reveal these more natural workplaces as relatively unstructured, with open books and open systems of communication, fluid work groups, high levels of autonomy, ample opportunities for friendship, and de-structured work processes. Being here is "vital" and animating involving a pace that is both draining and energizing, and filled with contradiction and paradox, conflict and uncertainty, high emotion and "fun." Participants structure the experience of work in five universal ways, described in their own words below: Self and Self-Other Relationships, Connectedness and Relatedness, The Role of Past Experience, Individual Differences, and Meaning in Work.

Participants fill their days with activity which moves them and the organization forward. The days are both "too long" and "not long enough." When the roller-coaster is in motion, people are tired and supportive, teasing and resentful, hopeful and frustrated, excited and angry. "Fully alive." Pushing to be their best often demands that all their energies be directed towards a narrowly-defined product goal, subordinating equally important objectives and desires. It's frustrating. Work is depleting, yet somehow adds "life to the hours" both at home and at work. Work requires continual negotiation between both outward and inward projections: fulfilling your own needs in the challenge to learn more, do more, be "better" than last time, sometimes clashes with specific organizational needs and interests; personal time sometimes clashes with the need for overtime to complete a project or shipment date. A deep sense of safety comes in knowing that you are trusted, in conjunction with a darker sense of doubt in knowing that you are solely accountable within that trust.

Self in relation to others involves demands, interruptions, arguments. There is a sense that "I can be myself" in the midst of others, having no need to justify actions or to remain on guard lest someone misinterpret our actions. Interacting with others--in play, in dialogue, even in conflict--serves a generative function in the creation of new ideas and suggestions, new perceptions of others, and new perceptions of self. Within this environment, it is with great difficulty that people talk only of "I." Rather, it is "our" work, "our company," "our" project. This collective orientation frequently runs up against the personal valuing and significance of choice and autonomy at work.

The structures, processes, management, and directives of work--both explicit and implicit--make up a web connecting people, job tasks, goals, and meaning. Respect is a key foundation--respect for one's views and variations, for how you express yourself through your work, and for how you relate with others. This respect leads to the creation of work processes which encourage dialogue and innovation. To exclude someone from full participation within the workplace is an expression of disrespect or of "not recognizing humanity": not listening, not involving, not engaging, not making eye contact, making decisions which affect a work group without their input and insights, responding to one's ideas with ridicule, sarcasm, or silence. Inclusion demands participation and voice, which constitute "being a person" at work. Only through such participation and interaction will product quality be assured and improved, a sense of purposeful work be created, and interest and energy maintained.

As participants describe, respect is closely related to trust, because "when you respect another, you see your common humanity"--you see yourself within them. This implies high levels of trust from the first moment of relationship, given freely rather than following a testing period, trust which is maintained until actions occur which prove misplacement. "Empowerment" is a part of the human condition, rather than something that is granted or bestowed. Such trust is incompatible with tight controls, and implies such conditions as the personal use of company equipment, elastic timeframes for work, even the willingness to have others laugh with you at your own

mistakes and trust they have no hurtful intent. As one leader described, trust is the belief "that people want to perform at their peak," then providing what they need and getting out of the way so they can do so.

With trust comes responsibility: the group is responsible for the project, the person for their work, the company for the person. Connected to responsibility is a strong sense of both personal and collective accountability. When you hold the responsibility, you are accountable for the decisions you make, the work performed, the hours claimed, the copies made. Accountability recognizes, however, that outcomes are not always a matter of individual performance but the result of factors outside our control. The need for close interaction with others becomes necessary then, in order to support conditions which make accountability, responsibility, and understanding and empathy, realistic conditions of work.

Joking with co-workers, talking with the boss, examining a part, or taking time off to run the car into the garage become significant activities when framed against previous work experiences and our prior sense of what work is. Guilt lingers at times, "old tapes" claiming we should be more productive, or suggesting that people are watching, whispering, when we arrive for work 15 minutes late or leave a few moments early. Hesitantly, we sit for the first time among a work group, listening to heated debate and struggling to express our own ideas when that has never been invited until now. Escaping past bonds demands learning: learning to participate, learning to trust your instincts and judgment, learning to fight it out within the project room and still remain friends afterwards. The past loosens its hold as we come to know that we are valued and important here, that people will listen to our ideas. The construction of new meaning can be filled with frustration, though, and we sometimes insist on imposing the structures we are most used to as a way of confronting and overcoming the uncertainties before us.

A wide range of individual differences seem to influence the experience and meaning of work. Some people described a childhood upbringing they believed impacted their comfort or discomfort with their present workplace. Instincts for taking action may influence our sense of whether a system is too rigid or not rigid enough, provides too much structure or is chaotic, is safe or threatening. Other participants suggested age as a critical feature: younger workers believed their young age made them more flexible, adaptable, able to interact more authentically with others; older workers believed these same characteristics were attributed to their greater maturity and experience within the workplace. Individual differences, though frustrating at times, also serve to create a culture and work climate that are filled with the noise of life, the full range of sounds that accompany celebration and anger, joy and conflict, work and play. Some suggested it is the absence of such noise that reflects the more oppressive, restrictive work environment.

Within our society, the meaning of work will perhaps always be somehow connected with our ability to create and maintain a lifestyle. Yet within this environment there lie more fundamental meanings as well. According to these participants, work constitutes how we care for others and how we contribute to their lives. "It's a reason to create." Work means personal growth through the daily struggles and challenges, through expressive activity, and an ever-broadening perception of our presence in the world. It means the "thrill" and pride in "seeing something come from nothing," or in "pushing myself to do what I did not believe I could do." The experience of trust, responsibility, being connected with others, and recognition help to create meanings of value and of the awareness of one another's essential humanity. In the past, when these have been absent, participants present a reliance on financial outcomes to define meaning within work. While the material rewards as a meaning for work remain for all people, they increasingly dim as we engage more closely with others in purposeful work.

Discussion of Findings

Participatory or democratic social arrangements are more likely to result in experiences which arouse curiosity and strengthen initiative (Dewey, 1938), necessary conditions for continuous improvement. The natural workplace expresses its educative potential through interaction with others, structures and systems for communication which demand interpersonal competence and dialogue, movement from self-protective to ever-increasing autonomy, and the encouragement of postformal thought through processes which compel complex means of problem-solving. The "dark side" of work is balanced in part by ample opportunities for informal relationships which provide opportunities to re-energize and rejuvenate from the complexities present within the workplace. Participants indicated that interaction with others, and the nature of relationships which developed, affected not only the quality of the work but also one's sense of self. Cognitive development accompanies increases in social-cognitive experience as people are challenged to reflect on their beliefs or behaviors, to debate and dialogue, and to approach their work more critically (Sinnott, 1993). Increasingly complex ways of solving problems develop with social experience and encourage critical and postformal thought (1993).

The vital workplace depicts an organizational consciousness which values mindfulness--the active processing of information, differentiation, and always-present awareness of context. Langer (1989) proposes that human potential can be expanded through processes which demand an active rather than passive experience of work, cultivating individuals who continually create new challenges for themselves. Organizational goals are achieved by people who are originators rather than pawns, and expressive creativity encourages innovation rather than conformity and satisfaction with the status quo. Organizational leaders play a key role in removing barriers and developing mindfulness -- not by way of control and power but in terms of de-structuring work and the persistent and careful attention toward what will be of most use to the workers.

The idea of partnership, of interconnectedness, of holism, within the workplace leads us to appreciate that we are not separate from the world but a necessary and vital part of it. This interconnectedness, however, can and often does arouse conflict and contradiction. Rather than working to alleviate such uncomfortable conditions, leaders recognize that the tensions created can serve as originators of growth and development, opening avenues for new learning about self, about others, and about being a part of the work community. The natural workplace is as full of frustration as it is of joy, of angry emotion as it is compassion, of unpredictability as it is trust, of conflict as it is of happy and satisfied people. It seems to embrace all expressions of human nature, and values them each as sources of human animation and meaning. People, as one participant described, "live loudly" in their shared pursuit of business profits, relationships with others, and meaningful work.

Cultivating Vital Work: Implications for HRD

Participating workplace leaders involved in this study support the idea that *how* vital work evolves follows no set formula; there is no clear prescription of "steps" to take nor a clear point indicating when an organization has "become" a vital workplace. It is an on-going process of unfolding and learning; reframing organizations as sites for adult development begins not with a prescribed formula but with critical assumptions (see for example Aktouf, 1992; Bolman & Deal, 1995; Briskin, 1996; Dirkx, 1996; Welton, 1991) of human nature: that people are active constructors, not pawns, within the workplace; that we carry in us an innate drive to create something larger than ourselves; and that we are naturally motivated and empowered. When these are not expressed in our work it is less due to a deficit people hold but because of barriers embedded within the work context or our past experience. The findings of this study support the anecdotal evidence, prior research, and theory of the relationship between work and learning in suggesting central principles for HRD and the cultivation of the natural or vital workplace. These principles guide the concrete ways in which work is structured and conducted. While these principles are not necessarily exhaustive, they do present an experience of work which focuses on a way of being and becoming, on presence rather than appearance.

Solidarity. It is imperative that people within the workplace be seen as active and willing participants rather than as instruments of production. We must abandon management based on authority and in its place create opportunities which nurture people's natural desire to belong, to contribute, and to engage in meaningful work. Managers are not "artisans of liberation;" rather, a culture of convergence and sharing must be inserted into actual practice where people act on their intentions through reasons, feelings, and choices rather than by "causes." Only then will we recognize a unity and quality of worklife based on community of interests, objectives, and standards.

Engagement. Participatory and self-directing work processes provide the necessary opportunities for development through autonomy, relationship, and engagement with others. This participation, however, must be unrestrained by channels of command and mechanisms of control. Rather than simply a symbolic participation, people must participate in a real way with the sharing of profits, power, property, and decisions. The *perception alone* of autonomy, of being valued, and of participation will not sustain the more humanized workplace. It must, as Aktouf (1992) describes, be a lived rather than appropriated experience, one which holds the human actor in high regard in an authentic way. We also know we cannot engage people simply by asking them to participate; based on prior experience, many people will have to learn what it means to participate. The quality of engagement within the workplace is enhanced when leaders foster dialogue, authentic relations, and reflection by modeling these behaviors, challenging people, asking questions, and offering opinion over directive. Dialogue and reflection are sustained when people can see positive outcomes from these exchanges--when they see their voices are heard, their questions answered, their ideas considered, when information is freely shared, and when understanding is viewed as an important part of work. People's sense of business literacy will be enhanced through the free sharing of information and business problems concerning all aspects of the business--hiring, orienting new workers, sharing in the evaluations of work completed, regular information concerning the company's financial performance. Engagement also demands recognition of people's contributions in order to sustain their efforts and energies. Just as

critical are opportunities to come together in informal ways which help cultivate a sense of solidarity and engagement with others: common eating or other socializing areas, company-wide events held, and organization-wide communication must be emphasized. These serve to enhance a real and meaningful sense of unity and connectedness.

Mindfulness. It is critical that an organization become willing and able to reflect on itself, to critique and question its own work relations, and to cultivate a more mindful or conscious orientation to the full environment in which it operates. Growth and development are fluid constructs, and there is never a point where either an individual or an organization has "made it" to a definitive evolutionary end. This more conscious and critical perspective provides the means for increasing both personal and collective capacity, to expand identity and embrace a larger view of ourselves in the world.

Connectedness. A greater sense of holism, of connectedness and interconnectedness, must be recognized as it pertains to the worker and the product, the person and the environment -- we must view work in its full complexity and multidimensional character. This includes, for example, the relation between language, meaning, and work, and the relationship between communication, information-sharing, and a person's ability to contribute in a meaningful way. Conflict and contradiction are inherent components of connectedness. Rather than rushing in to "fix" problems, to ease tempers, or to speed production, organizational leaders are instead compelled to prod and push, to challenge people towards resolution. In this way, "problems" become forces for learning and innovation. For this to happen, however, leaders must reframe their sense of "resistance," and be willing to sit with the tensions created rather than jumping in to resolve problems themselves. This holding of the tensions encourages people to break out of their comfort zones, to think more critically, and to transcend rather than concede.

Meaningful Purpose. Finally, the purpose of work based strictly on economic assumptions must be challenged. Where more traditional workplaces and many workplace reforms focus on profit and consumption as primary goals, the vital workplace understands these as natural byproducts of a more humanized environment and as a means to contribute to a greater cause. Work is not simply about money, but about satisfying our need for expression, innovation, community, and purpose. When we acknowledge the full function of work in our lives, we cannot help but begin to reshape our organizations. Begin by asking, If profits are important for us to survive as a company, why is that survival important? To what end are we, as a company, truly working? And then, How can we best reflect this focus in the ways in which we conduct work?

Conclusion

Reforms that are targeted to change the behavior of others are not reforms at all (Aktouf, 1992; Block, 1997). Such reforms oversimplify human nature and depict the worker as an object rather than as subjects in their own right. By continuing to objectify the human at work, we relegate development to that which happens only when authorized by someone else, embedded within traditional structures of power and control. This ideology fosters a narrow and restrictive growth -- a miseducative experience -- in both the individual and the organization (Dewey, 1938; Welton, 1991) because it fails to acknowledge the complex relationship between individual experience and the full organizational context.

In contrast, this study suggests the natural workplace holds a greater educative potential. This study suggests that by de-structuring work and through the manifest valuing of the whole person within the organization, the natural workplace removes the barriers which serve to restrict and distort growth. Real and fundamental change within the workplace evolves through dynamic and contradictory means, where development is not a function of training but a way of thinking about and conducting work as a whole. This study reveals characteristics of educative work environments which return the person at work to that of a subject who acts upon his or her world. Such a workplace is not a utopia; it demands of people greater flexibility, the development of new skills, and a high tolerance for conflict and ambiguity. Fortunately, these environments provide the necessary context and opportunities for developing these qualities.

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Action Learning as a Strategy for Inducing Psychological, Cultural, and Organizational Boundarylessness

Verna J. Willis
Georgia State University

Robert L. Dilworth
Virginia Commonwealth University

A global, borderless marketplace; a new global citizenry; and an unprecedented demand for quickly mobilized, boundaryless responses to meet consumer and citizen needs are serious facts of life for today's organizations. At bedrock, the boundaryless condition appears to yield competitive advantage to corporations and at least potential humanitarian advantage for collaboration among governments, non-government agencies, and other international entities. Research data are beginning to show how action learning specifically provisions the journey to boundarylessness, as told by those who do the journeying.

Keywords: Action Learning, Boundaryless Systems, Psychological Freedom

Critical incident data from an on-going, comprehensive study of qualitative action learning effects, data from investigation into the nature of "boundaryless" organizations and individuals, and a noted absence of theory that connects action learning and boundaryless organizations has led to this non-positivist, multi-source inquiry. It has been triggered specifically by statements action learners make about how boundaries once present-- limiting their abilities to think and act--tend to disappear when they are engaged in action learning. In the critical incident data analysis, which has been facilitated by use of NUDIST software, feeling "boundaryless" emerged as a consistent theme.

It is in the research tradition of open systems thinking that a discussion of implications of this dominant theme is undertaken. When there are isomorphic relations between phenomena –in this case action learning and boundarylessness, then there is cause for examining the two together. Unfortunately----because no such definition exists -- this cannot begin with a clear definition of "the state of boundarylessness" that covers either the case of action learning as a group phenomenon or that adequately treats the case of the individual learner who moves from psychological constraint to psychological freedom. Yet as direct quotations cited later will show, moving from constraint to freedom is precisely what action learners say they do. Presumably, there is no boundaryless organization that does not expect to engender some degree of psychological freedom in its boundary-spanners, as well.

Searching the term uncovers a frustrating collection of assumptions about what it means to be in a *state of boundarylessness.* Most certainly these assumptions do not get a full review in the new literature of organizational change. A ruling assumption seems to be that it is an organizational, not an individual or personal issue. Another assumption implies that the term of newer mint --*boundaryless* --is somehow more explanatory and conducive to action than the older systems term, *open.* Just beneath the surface of the latter assumption lies a compelling call to throw open those boundaries that have traditionally and purposefully been closed, in the hope of now achieving greater flexibility of thought and action. Boundary-busting is expected to catalyze the removal of obstructions to the free passage of information throughout the organization.

Hastings makes such assumptions when he envisions the new organization as a loosely coupled organic network (1993, p. xvi). In his words, "boundary-busting" is a way to achieve this network state, involving:

> a systematic awareness and elimination of physical, personal, hierarchical, functional, cultural, psychological, and practical boundaries and barriers to such cooperation and communication as a continuing process that is necessary to perpetuate the ability of the new organization to stay flexible and adaptable.

This is his prescription for the boundaryless organization. It implicates people, but does not suggest how they can be helped to move toward boundarylessness on an individual level, to achieve the psychological freedom necessary for non-hierarchical networking.

Using Hastings work as one of many possible signposts for traveling further along this conceptual path, we can infer a pair of further assumptions the advocates of boundarylessness are making: that individuals will

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somehow learn to do and be whatever working in a boundaryless organization requires of them, and that this will be of general benefit. But holding to such assumptions could fly in the face of the realities of cultural differences, psychological readiness for open communication, individual adaptability, and the tendency everyone in or out of the work-place has to protect preferred comfort zones.

While companies like General Electric (Ashkenis, et al, 1995)seem to spend considerable time, money, and energy in the process of encouraging boundary-crossing, not every organization will be willing or able to make proportional investments. Will a new elite of individual boundary spanners emerge from the boundaryless companies, leaving behind those in the same or other organizations who are not enabled to join them by any organizational means? *Should everyone, to some as yet undetermined degree, learn to be without boundaries?* What is it that is let loose when employees encounter opportunities to rethink what their lives in organizations consist of, and what boundaries do or do not work for them? We believe that studying action learning is giving us some preliminary answers.

What Does It Mean to be Boundaryless?

Reviewing current literature makes it apparent that the language of boundarylessness is anything but precise. It is used assumptively and inconsistently, although it may represent earnest attempts to open up our understanding about what systems are, or are becoming. Just as there are relative values attached to degrees of openness, there are relative values attached to what is expected to happen at the boundary where crossings begin. Is the intention to eliminate the boundary altogether --as Hastings seems to advocate? To span it, permeate it, or simply ignore it as if it did not exist? Is the boundary sometimes a solid wall to be breached as if by assault? Is the boundary that we think we are seeing even there?

These are not inconsequential questions, for they have to do with both personal and organizational integrity. Is there □safe conduct□across the borders for some but not for all? If there is selectivity, is it gendered or culture-bound? What gets handled at the boundary as free currency, and what does not?

Is boundarylessness ad hoc or temporary? If the boundary is real, what happens to it over time? What will happen to individuals, to the organization, and to its environment if any boundary in question goes away forever? There is no end to our lack of knowledge about such matters.

Some of these issues may come into clearer focus if we view the action learning set as a microcosm of the broader enactment of organizational and national boundarylessness. There are reasons to believe that a set of six to eight concerned individuals, fully engaged in learning about itself, its work, and about each member of the set is actually such a microcosm. It is *holographic*, with the whole represented in each of the parts; *heterarchical* and diffuse in power; *structurally unconstrained* and free-flowing; always ripe and tensile with the *creative variety and virtual latency* of the whole set and of every member in it. (Morgan & Ramirez, 1983; Ghoshal, 1993; Hastings, 1993; Willis, 1979)

How We Have Approached Our Study

Our research methodology is mixed, using history, conceptual modeling, critical incident analysis, and observation of action learning sets specifically but not necessarily confined to these. Certainly a phenomenological perspective is involved.

We have not found published research that makes explicit the nature and effects of action learning set boundarylessness (as the term is now being defined) and we have so far failed to find even a working definition of individual boundarylessness. In the search for allied concepts, we have come closest to what we are looking for in futurist literature, especially evolutionary systems theory; in the theories of psychology including research literature in small group behavior; in theories of community, social ecology and communication including cultural communication; and in existential theology, the epistemological source of most 20th century writing on the nature of dialogue (e.g., Bohm, 1990).

We have not found research that even asks the question of how differing degrees of individual boundarylessness in set members, or correlatively in set advisors/ mentors, may affect the degree of boundarylessness in the microcosm of organization that we call the set. While some literature on organizational readiness for action learning (Redding & Catalanello, 1994) has begun to emerge and the need for executive

sponsorship of and commitment to all organizational interventions is well known, what degree of boundarylessness is needed and what it looks like in individual leaders of macro organizations is not clear.

The absence of organizational trappings, including status differentials and prescribed ways of doing things, is a distinguishing feature of action learning. Because no one knows what will happen, the boundarylessness of the set is experienced powerfully, immediately, and potentially, long after a set is officially finished with its work. Significant short and long term changes are induced that, if mapped into the macro organization, could take it into genuinely new territory. The key to what to do in organizational turmoil runs deeper than the massaging of organizational boundaries, and individual psyches are involved whether we like it or not. This is overtly recognized in the action learning set.

Boundaryless: A Working Organizational Definition

There is a tone of urgency in the struggle for new language to describe new kinds of organizational and human possibilities. We say it repeatedly because we really feel it: we are in an era when waves of change occur so rapidly that before we have half struggled to our feet and accommodated to one, another and another breaker are upon us. In an earlier work, Dilworth has definitionally linked boundarylessness with the changing face and body as well as the chaotic movements of contemporary organizations. The following brief, with a quoted excerpt, are drawn from the detailed descriptive entry that first appeared in the 1997 edition of *The Encyclopedia of Public Policy and Administration.*

To a very large extent, our ways of understanding boundarylessness are limited to structural interpretations. There are three commonly understood types of structural boundaries: (1) lateral, between functional components, 2) hierarchical or vertical, between organizational layers, and 3) perimeter, demarcating organization from environment. A fourth dimension requires diagonal interactions that cross-cut other boundaries. These interactions are more typical of Japanese companies. All four types of structural relationships are considered malleable, or at least not sealed against tampering, as constant organizational restructuring in every corner of our lives reminds us.

Boundaries also form the edges of sharply or fuzzily defined mental □boxes□ of organizational members. Often invisible, these nevertheless may operationally define what occurs in any given organization. Some of these are boundaries bricked up by accrued (and often unexamined) experience; others are culturally derived, and still others may have roots in individual personality.

Public sector organizations and their employees are not immune from the necessity of questioning traditional boundaries. While political constraints are recognized, the problems of interagency, inter-government coordination are not insurmountable, and the increased capacity to provide services is a powerful incentive to loosen the bounded systems. All systems are presumed to have opportunity to become less constrained by visible and invisible boundaries. The following definition is therefore to be understood as independent of organizational context. To be *boundaryless* involves the

> ways in which organizations delineate themselves internally and with their external environment, with a goal of minimizing constraints to flexibility imposed by boundaries, whether functional, political, psychological, hierarchical, multicultural or related to professional specializations.

The appearance of both cultural and psychological boundaries in this definition returns us vividly to the problem of defining boundarylessness in personal as well as organizational terms. Again, there are assumptions to sort and peel off from the root concept.

What Does It Mean Personally to be Boundaryless?

Any conclusion that personal boundarylessness necessarily exists in a boundaryless organization may be erroneous. The converse may be equally suspect: just because a person appears to be exercising a high degree of psychological freedom (i.e., acting boundaryless) in an organization, it does not necessarily follow that the organization is boundaryless. It may be anything but, and the boundaryless person working there may easily be an unrecognized or unwanted anomaly in that organization. Further, if it is imagined that becoming boundaryless is highly valued by everyone, such an assumption is easily challenged. What actually happens is that the slightest hint of incipient

boundary freedom may evoke from any particular group of individuals a wide range of responses --from eager endorsement to cautious skepticism to pure terror and retreat. Thus the question of what boundarylessness means to each individual goes unanswered, and how much we can expect each to move in the direction of boundary freedom is also unanswerable, case by case. It may even be that some individuals are subject to considerable life disruption and unmanageability if boundaries are blurred or lacking. (Cloud & Townsend, 1992). Certainly every person reconsidering boundaries is courting vulnerability.

Correlatively, if persons do not learn and change in the direction of boundary freedom, can organizational boundarylessness be anything but the structural kind? In a world where we have come to recognize the inexorable influences of chaos, constantly deconstructing and reordering the universe, what choices do we have about living and working □boundaryless?□

Finding Boundary Freedom in Action Learning

Often the participants in our research on action learning seem naturally to seek and find boundary language to describe personal breakthroughs in their set evolution, their own unfolding of awareness, and their tackling of the problem in focus. Simultaneously they demonstrate considerate behavior toward those who are unready for such breakthroughs. Though occasionally in frustration they would like to throw a set-mate into the murky seas of boundarylessness, sink or swim, upon reflection they tend to see that learning to swim is an individual matter and needs to be individually paced. The implication is that boundarylessness is not something that can be forced in the organizational microcosm of the set.

To the best of our knowledge, none of the action learners who have left written records for us were working in organizations that claimed to be boundaryless. But in the context of the set they say they behaved in boundaryless ways. This confirms that there is a need to define personal boundarylessness as distinct from the macro-organizational context. It is doubtful, however, whether such a definition can ever separate itself from the milieu of close interpersonal relationships, i.e., the existence of a community sufficiently attuned to learning and personal growth so that responsible individualism and boundarylessness can flourish. It is because action learners experience a heightened consciousness of themselves in relation to others that existential thinking has relevance. It is a theory base perhaps less familiar to many readers than other sources of theory cited above, and for that reason it is highlighted here.

Existential Thought and Boundarylessness in Action Learning

Organization theorists know that reference groups are important to employees. The action learning set dealing with real problems in real time is certainly a reference group of a very high cognitive and affective order, involving high personal and organizational stakes. In an action learning set, the forming of community --i.e., set cohesion --is a critical factor in how learning takes place and work gets done. Though he certainly was not referring to action learning sets, a quotation from Paul Tillich helps our understanding of why sets operate the way they do:

> Participation is essential for the individual, not accidental. No individual exists without participation, and no personal being exists without community being. The person as a fully developed self is impossible without other fully developed selves [with whom it is in relation]. (1951, p. 176)

The extent to which bonding occurs in small group behavior --if the small group may be taken as a latent community --will also affect the degree of boundarylessness achieved by individuals in the group. Buber (1958) offers two warnings against the valuing of task performance over group process. Obviously from the quotation, Buber is speaking of group activity generally, but the warnings seem custom made for action learning sets that struggle with prioritizing work outputs and the requirements for learning through process and information exchange. In our research as well as in the findings of others, this difficult balancing act has emerged as one of the primary concerns of set members. They might find Buber's perspective helpful. His first warning is:

> In the view customary today, which is defined by politics, the only important thing in groups, in the present as in history, is what they aim at and what they accomplish. Significance is ascribed to what goes on within them only in so far as it influences the group's action with regard to its aims...

> By this simplified mode of valuations the real and individual worth of a group remains as uncomprehended as when we judge a person by his effect alone and not by his qualities. (p.204).

The second warning is against collectivity, which he defines as

> not a binding but a bundling together: individuals packed together, armed and equipped in common, with only as much life from man to man as will inflame the marching step. (p. 205).

What this reminds us is that there are times when action learning sets do not reach the desired state of community but instead remain a collectivity so totally devoted to conquering the task performance that the opportunity for learning is denied and any incipient psychological freedom suffers frost-kill. In contrast, Buber explains, the experience of community is being *with* one another with everywhere a turning to, a dynamic facing of the other. Collectivity, he says, is based on an organized atrophy of personal existence, [while] community [is based] on its increase and confirmation of life lived toward one another. (p. 205).

Buber insists that dialogue and community are matters of personal freedom and commitment:

> The life of dialogue...begins no higher than where humanity begins. There are no gifted and ungifted here, only those who give themselves and withhold themselves. (p. 209).

One more excerpt from this briefest of tours of existential thought refers directly to change in the structure of consciousness and change in the scale of values. Berdyaev (1958) asserts that

> in the fight for the freedom of man, for the manifestation of the free man [the] process goes deep and its effects can but slowly become apparent. It is a profound interior revolution which is brought about in existential, not in historical time. (p. 157)

The existential view is that attaining psychological freedom or boundarylessness (and in their most constructive sense these terms may be synonymous) is at once a communal (community-based) and a deeply personal act of choosing to see things differently. Results are seldom instantaneously visible, but are instead the product of reflection and dialogue over time.

This seems highly descriptive of what occurs for individuals in action learning sets. There appears to be a period of time when, on the surface, nothing seems to be happening, but when in the creative psyches of perfectly ordinary human beings, the variety available in the learning set community is being richly reconfigured into new thought patterns and often new values. Before these manifest themselves in new actions and attitudes, the set may be said to exhibit *virtual latency* (Willis, 1979, p. 381): *virtual*, because the dynamics of the personal and interpersonal transitions are unseen, and having *latency* because productions of these unseen dynamics are still waiting in the wings. The concept of virtual latency in human creativity may have potential for explaining some of the lag in concrete results that executives may initially expect from action learning, and may help to encourage a longer term view of the development of boundaryless people and organizations.

Boundaryless: A Working Personal Definition

The exercise of psychological freedom within community is not solely an existential ideal, of course. It is also rooted in the human relations movement where the practicality of working in small groups in an atmosphere of mutual trust and honest communication has been demonstrated over and over. It is from these dual and overlapping kinds of source materials, as well as from our research on action learning sets themselves, that the following working definition of personal boundarylessness is derived. It is intended, as in the case of organizational boundarylessness, to be a general definition, applying to individuals in any life circumstance. It is also proffered as an artefact to facilitate further research and discussion in action learning. *A person becoming boundaryless* engages in

> the personal working out of open, authentic forms of risk-taking in egalitarian interactions that allow an individual to push out the boundaries of the self and realize new levels of psychological

freedom, awareness, insight, and ability to act constructively, while valuing similarities and differences with which others approach the same process.

Cultural uniqueness is certainly one aspect of the valued differences and similarities. This is often a critical piece of the action learning endeavor, as unfamiliar problems are addressed in unfamiliar settings by people who do not know each other. People who do not know each other can be working side by side, of course, since organizations do not necessarily seem like good places to be yourself.

A Bifurcating, Borderless, Chaotic World

Since wanting boundarylessness has risen to the level of suggesting a conscious organization development strategy (Askenis et al, 1995) as well as a conscious career development strategy (Arthur & Rosseau, 1996), it is fair to ask what the origins of these strategies might be. We have mentioned some of the antecedents in psychological and existential theories and belief systems. If strategies designed to achieve boundarylessness are further associated with a particular world view or a particular concurrence of social, economic, political, religious, scientific, and intellectual histories, we ought to learn about this. The alternative is that we may decide blindly *whether* to engender boundarylessness without also understanding *why we should or should not.*

We have sought global insights from representative writers in fields ostensibly far from each other: the branch of philosophy of science that is investigating evolutionary systems theory where Ervin Laszlo and Ilya Prigogine are dominant figures, and the economics of global competition as viewed by Kenichi Ohmae, who has been called Japan's only management guru (book jacket). Each may have made contributions to the current strategic emphasis on boundarylessness.

The alien language of chaos theory, a derivative of dynamical systems theory which Progogine's work in chemistry set in motion, has been creeping into management literature and organization parlance for well over a decade. It is now acceptable to speak of chaotic organizations as not necessarily behaving randomly, but instead responding to a new set of attractors that will launch them on new courses of action and establish new kinds of order. The task of management then becomes (in vastly oversimplified terms) to grow agile enough to catch the wave of change and then somehow get out in front of it in a reasonably logical, forecasting way. This, says Laszlo in *The Age of Bifurcation* (1991), is a sign of our new dependence on intelligence --rather than fight, flight, or camouflage --for our very existence.

He calls this reliance on intelligence a fateful gamble, for now our collective survival, and that of the whole biosphere hangs in the balance (p. 95). Laszlo is by no means sure that human intelligence has evolved sufficiently to choose forks in the road that will advance humanity and not lead to its destruction, but he thinks there is hope if qualitative, intensive development on the scale of entire human populations can occur (pp. 102-3). What he views as essential to this undertaking is a holistic alliance of science, art, religion, and education in a unitary process that would seek the cultivation of new forms of consciousness. (pp. 93-94). Bifurcation is now a common experience of all people regardless of their location on a global map. They have come to that turning point where their histories do not afford the means to predict their futures, as systems --nations and ethnic communities --move close to the threshold of their stability. They live dangerously in part because they are required in the passage of time and evolution to become more complex than they are ready to be. Laszlo considers this an unsustainable situation. He sees that we may yet gather our wits and act to bring about a global society that is integrated yet diversified, dynamic and complex, and organized on many levels, from the grass roots to the global. The alternative he sees is continuing on present course, to our own destruction.

Ohmae, in *The Borderless World* 1990) sees an interlinked economy sweeping across national boundaries to serve consumers who can travel and see what they want, or who can view a vast choice of products on the internet. In Ohmae's opinion, the new access to information creates global citizens whose awareness puts pressure on nations and companies to respond in boundaryless ways. He believes that, For managers, this flow of information puts a high premium on learning how to build the strategies and organizations capable of meeting the requirements of a borderless world. (p. 22).

According to at least one branch of the philosophy of science conversant with the new science of complexity, and according to at least one assessment of consumer boundarylessness, as sampled here, we are collectively and separately destabilized by bifurcations, without the comfort of historical precedents to guide us and without scouts who have been to the territory ahead of us and returned. There are no landmarks. This is not to say we have no recourse. Laszlo points us toward boundarylessness in developing new consciousness of our human interdependence. Ohmae has us recognizing that the whole world is everyone's uncarved-up marketplace. This is a

useful backdrop for envisioning ways in which action learning can help to develop the new consciousness of which Laszlo and the existentialists have spoken, as well as the new economic order that is already on its way.

Boundaryless: An Action Learning Set Definition

Throughout our ongoing study of critical incidents, now in its third year (Dilworth & Willis, 1997; Willis & Dilworth, 1998; Dilworth & Willis 1998; Willis, 1998) the unleashing of freedom to think and act is found to be characteristic of the action learning experience. Freedom has opened in two directions, upward toward potential behavior in the macro organizations and national-to-global entities set members will encounter, and downward into the heart of the set and the dynamics of change in persons. The freedom is intensely felt and finds its way into several additional domains in the data: personal growth, new insights, unprecedented learning, and finally into a category sufficiently distinct to be called boundarylessness.

There is high variability in action learning sets and in those who start them in motion. This is to be valued if for no other reason than the provision it makes for the airing of many opinions, surfacing tacit knowledge, and encountering of cultural assumptions so different that set members find a need to revisit their own. The presence of this variety precipitates the individual process of pushing out the boundaries of the self, encouraging new perspectives and new possibilities for action. On the other hand, an over-stressing from volatile interpersonal dynamics in high variability situations can cause retreat of participants (and in some cases retreat of their mentors) from the self-regulatory principles on which action learning is based. Boundary issues will surface, early or late. Examining how they are handled, by whom, might tell us as much about ourselves as set mentors as it does about the set. But this is research that is still to be done. What is intended here is merely to point out that the degree to which set members are allowed to experience *boundarylessness* may sometimes be constrained by a mentor's own discomfort with it.

The functioning of action learning sets does not occur in splendid isolation. In the real world of the real problem, perceptions of how much boundary-pushing the client organization is willing to absorb have their effect. If the organization clearly understands what boundarylessness entails and is prepared to capitalize on such liberation strategies, this raises the ante in favor of set engagement in personal and organizational boundary experiments. If set participants themselves understand and embrace the risks involved, and if set mentors in turn are able to deal squarely with potential negative fall-out in their own professional lives, then the odds dramatically increase that boundaryless ideation and behavior will be seen in set activity.

In the words of set members who provided us with critical incidents we have found support for defining boundarylessness in this particular way:

> Being boundaryless means feeling freedom; liberation; having accountability without burden. We care deeply about the problem, or about someone's behavior, but we don't own it.

Deeply embedded in this set-derived definition is an expressed positive value in crossing organizational and psychological boundaries at will. There is, however, an attending caution that it must be accomplished ethically, *without invading or usurping power belonging to others.*

The definition allows neither a cop-out on responsibility nor a subscription to the liberty of doing whatever one pleases. Obviously, these were sets working on the problems belonging to external client organizations, not on problems they themselves had brought to the table. A disclaimer of ownership of someone else's problem seems appropriate even in each one bring one kinds of sets, however.

Set members clearly understand that, in crossing boundaries (and perhaps oceans), they have evicted themselves from what they thought were relatively safe experts boxes and chosen to wander among others from whom they may learn and with whom they may find solutions. As one reported, Seven heads are better than one --if you can stand the seven! This stepping out from the enclosure of their own knowledge comes to them as a great relief. They feel liberated to learn, liberated to challenge assumptions and ask questions that never would have occurred to them before, and finally even the heavy burden of being found intelligent enough to pin down causes and solve arcane organizational mysteries all by themselves drops like a dead weight from their shoulders.

They also understand that boundarylessness has its costs: the down-playing of hard-won expertise and the relinquishing of cherished but no longer tenable beliefs being foremost among these. Set members talk about both gains and losses in boundary terms, as in these brief excerpts:

I definitely [and uncomfortably] stepped outside my boundaries at that point. I am a non-confrontational person by nature. I was proud of my set. I think there were quite a few of us that pushed our boundaries. If learning cannot take place in a vacuum, as one set member wrote later, then the need for boundary snapping must be inherent in all learning. Surely it may be accepted as a given in the challenging air of a self-regulated set.

Boundarylessness and Set Mentoring

Perhaps each of us has a different threshold of tolerance for boundary freedom and its costs, and this tolerance may vary internally under different kinds of duress. If lives depend on caution, we tend to be cautious. However, if we are able to view our lives as worth risking for some improvement in life quality or some vision of a greater good, then we will tend to devise ways to get over, under, or around our personal and professional Berlin Walls. Risking certainly implies that not everything we might wish for is actually within our own control.

There is always a danger in set mentoring that we will tend to predispose a set in one direction or another if we have not completely understood our own power and boundary needs. Revisiting records of one set recently, we remembered that set members had chosen to work without a mentor. Control of the process (non-stop for two weeks) and of the final presentation to the client resided entirely within the set. Though some had had misgivings about this complete autonomy, the set was notably successful. Again reviewing our data, we noticed that there was a relatively low volume of comments in the five sets studied about mentor influence, if any. There may be situational reasons for this. But the relatively low reliance on set mentors among these five sets is also a signal that the next generation of research may need to look more closely at how sets and mentors learn --for good or ill□ from each other.

Closing Remarks: What Boundarylessness Means to HRD

In the final analysis, what we see happening in sets and where we place ourselves on the continuum of high to low intervention in set activity become deeply entangled with larger questions that we may already be asking ourselves. Potential disconnects between structural freedom and psychological freedom are of concern far beyond the action learning set and its environment, for organizations claiming to be boundaryless are already among us and are likely to increase markedly in number over the next few decades. Serving such organizations may require that we confront for ourselves a series of difficult questions like the following:

Are we, ourselves, as firmly attached to the rewards of short-term results as we perceive our client organizations to be? Are we required to be, in order to serve the client? Do we look for evidence of subtle change in mental operations as readily as we do for visible change in performance? Do we look for and value boundarylessness?

What does boundarylessness mean to a world, a society, an individual? What does it mean to us as adult educators and HRD professionals? Can the general definitions and the set-derived definition cited above hold up well in other circumstances? Do these have implications for human development on a global scale or is boundaryless a localized, largely western phenomenon? We have sketched out only a handful of the possible lines of inquiry.

To what extent does a set mentor, working either pro bono or for pay, have an obligation to prepare organizations and individuals for boundaryless futures? Are there limits to boundarylessness, or should there be? What if, in jettisoning boundaries, we begin to jettison a sense of ourselves, or our ability to perform tasks efficiently?

In our fervent embrace of organizational change and continuous learning,do we really know what we are doing? If we are flying blind, how can we improve our vision? Perhaps our own engagement in action learning –as participants, not mentors – could help us there,

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Contextual Learning of Owner-Managers of Small, Successful Romanian Companies

Maria Cseh
Oakland University

This study examines critical learning experiences of owner-managers of Romanian small private companies, which enabled them to lead successfully in the transition to a free market economy, in order to determine what triggered their learning, what strategies they used and what lessons they derived from their learning experiences. The lenses through which managers saw their world framed their critical incidents and learning experiences. The findings as well as their practical and theoretical implications are discussed.

Keywords: Managerial Learning, International, Informal and Incidental Learning

The decade of the 1990s brought dramatic political and economic changes to the countries of Central and Eastern Europe. As Child and Czegledy (1996) noted, "Since 1989 the area has been experiencing economic and political reforms of immense proportions. It has become a 'living laboratory' in organizational transformation within a context of profound institutional change" (p.167). After the collapse of these countries' former communist systems and centrally planned economies, a free market order is viewed as a quick and efficient way towards recovery. Shrader & Collins (1991) have also underlined that:

> Economic growth is bound to be slow unless there is an adequate supply of entrepreneurs looking for new ideas, and willing to take the risk of introducing them. Thus a private enterprise economy will be retarded if it has not enough businessmen, or if its businessmen are reluctant to take risks, whether because they cannot raise the capital, or because they are timid by nature, or because the differentials for risk taking are inadequate. (p. 66)

As most growth in this area is at present coming not from current or former state behemoths but from dynamic start-up firms (Anonymous, 1995a), the study of the ways owner-managers of these companies learn the skills necessary to lead their organizations is important. In the Romanian context, Anton, Danciu, and Mitu (1996) found that "the private sector proved it was capable of absorbing a large share of the labor force made available by public enterprises and of offering equal or even higher salaries to its employees. Private owners are an economic force that is proving to have better skills in administering their assets." (p. 72). A review of the current literature has revealed that insufficient attention has been given to the managerial concerns implied in the transition process to a free market economy in Romania (Nicolescu, 1992; Cseh, 1992). No evidence of managerial learning studies was found in this country. Thus, the problem addressed in this study is the lack of research in management learning in Romania, research which could shed light on ways in which managers learn with the potential of opening doors to the creation of a management development infrastructure.

According to Burgoyne and Reynolds (1997), "The learning part of management learning refers to both what is acquired and how this acquisition takes place, when individuals and social groupings acquire the ability to manage" (p. 5). Talking about the role of situated learning theory in management learning, Fox (1997) draws our attention to the fact that "formal management education and development are but the tip of a learning iceberg and that most learning to manage and managing to learn occurs 'on-the-job' in tacit, culturally embedded ways through people's work practices within organizations, groups, and other communities of practice" (p. 35). Wagner and Sternberg (1985) propose that tacit knowledge (knowledge that usually is not openly expressed or taught) plays an important role in intellectual competence in real-world pursuits. According to the authors tacit knowledge is a specific component of intelligent behavior that is important for occupational success, which is informal rather than formal and practical rather than academic. It is the tacit attributions, beliefs, and assumptions which make up the informal and incidental learning. As Stuart (1989) described, it is important to acknowledge that learning is taking place all of the time--even implicitly and haphazardly--as part of a manager's day-to-day work life and activities. Learning from experience, trial and error, social learning, self-directed learning were just a few of the modalities surfacing in the reviewed studies (Burgoyne & Hodgson, 1983; Lombardo, 1985; Zemke, 1985; Stuart, 1986; Akin, 1987; McCall, Lombardo, & Morrison, 1988; Dechant, 1989; Stuart, 1989; Marsick & Watkins, 1990; Verlander, 1992; Kops, 1993; Young, 1994; Burgoyne, 1995; Geppert, 1996; Simon & Davies, 1996; Soulsby & Clark, 1996).

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In the wake of all of the above evidence, the main assumption of this study was that Romanian owner-managers of private companies learn their jobs primarily through informal, incidental means. The theoretical framework of this study was therefore based on Marsick and Watkins (1990, 1997). Watkins and Marsick's (1992) seminal work on informal and incidental learning in the workplace. In their models, when learning takes place from experience, under non-routine conditions, people frame the situation they encounter by using their judgment based on their previous experiences and knowledge. In order to develop a strategy to deal with the situation, they assess the constraints and limitations of the context against the feasibility of each solution. Thus, the context is used to test possible solutions. Once a strategy or invention is formulated, people may need to learn how to produce that strategy. The implementation of the strategy leads to consequences which may be the intended ones or sometimes unintended ones. People then embed into their consciousness assumptions or generalizations about whether or not the strategy worked. Thus, out of the consequences, meaning is made of the experience and what is learned from the experience is retained. Marsick and Watkins' models were used as a point of reference for this study. This study was not designed to empirically test these models, but through thick description using a qualitative methodology, to elaborate on their components related to Triggers, Learning Strategies, and Lessons Learned.

Research Questions

The purpose of this study was to examine the critical learning experiences which enabled owner-managers of small private companies in Romania to lead successfully in the transition to a free market economy, to determine what triggered their learning, what strategies they used, and what lessons they learn. In order to attain the purpose of the study, the following research questions were investigated:

1. What triggered the owner-managers' engagement in the learning activity?
2. How do owner-managers of small Romanian private companies learn what they need to know to run their businesses successfully in the new free market economy?
3. What lessons do owner-managers derive from their learning experiences?

Methodology

In order to answer the three research questions of the study, information rich cases were collected through in-depth, face-to-face interviews with owner-managers of successful (on the top list of companies compiled by the Chamber of Commerce at county and country level) small (2-99 employees) Romanian private companies. The interviews were conducted by the researcher in Romania at the end of 1996 beginning of 1997. Managers were asked to describe at least three critical incidents from their managerial practice according to an interview guide which they received at the time they agreed to participate in the study. The interviews lasted between one and two hours and 72 critical incidents were generated.

Although 18 in-depth interviews were conducted, upon further study of the respondents against the sample selection criteria, 15 interviews were finally selected for this study. All but one of the managers interviewed were owners of their companies. In order to maintain confidentiality, the researcher assigned each of the managers participating in the study a numbered letter P1 to P18. These numbered letters were used by the researcher in the narrative and analysis of this study's findings. The 15 managers selected for this study were between 28 and 62 years of age. They were selected to represent both genders and the nationalities (Hungarian and Romanian) specific to the two regions represented. There were six ethnic Hungarians and nine Romanians, and four female managers selected in the sample. The managers were highly educated and obtained their degrees and certificates from Romania. All but three of the managers had a university degree and one of them had a doctorate degree.

Although this research study was conceptualized and reported in English, the data was gathered either in Romanian or Hungarian depending on the participant managers' mother tongue. The researcher transcribed verbatim all the recorded interviews and translated all but six of them. She is native Romanian of Hungarian nationality, speaking both languages at mother tongue level. She is multilingual and in the last fifteen years she has used English, which she learned in childhood, extensively in her work by translating, interpreting, and tutoring from English to Romanian and Hungarian, and vice-versa. Working with three translators, all knowledgeable of these languages and cultures, the validity of the translated materials was verified through back translations and re-translations of parts of the data. Although only small differences in the choice of words and translation of idioms

were noticed, the translators consulted on the issues and a decision was made on the best translation. Although it is impossible to achieve a word-for-word translation an attempt was made to keep the rendering as consistent as possible and still convey the meaning of the original message.

Content analysis with the sentence and paragraph as basic units of text were used in coding and analyzing the data of this study. The first step in the analysis was to clearly identify the critical incidents, the unit of analysis of the research. The second step was the coding of the data into categories. The researcher began the preliminary sorting of the data in the following three mutually exclusive categories: Triggers, Learning Strategies, and Lessons Learned. These categories were predetermined based on the study's theoretical framework. During this process a new category clearly emerged from the data. This category was called by the researcher Framing the Business Context and it was defined as the constraints and opportunities perceived by the managers in the context in which they operated. A total of 511 data strips were categorized in this way.

The third step in analyzing the data was the open coding of the data inside each of the categories to obtain specific themes through close examination of the data. As a result of this process, seven themes emerged under the Framing the Business Context category, Triggers and Learning Strategies each had six themes, and Lessons Learned had five themes. The four categories with their themes are presented in Figure 1.

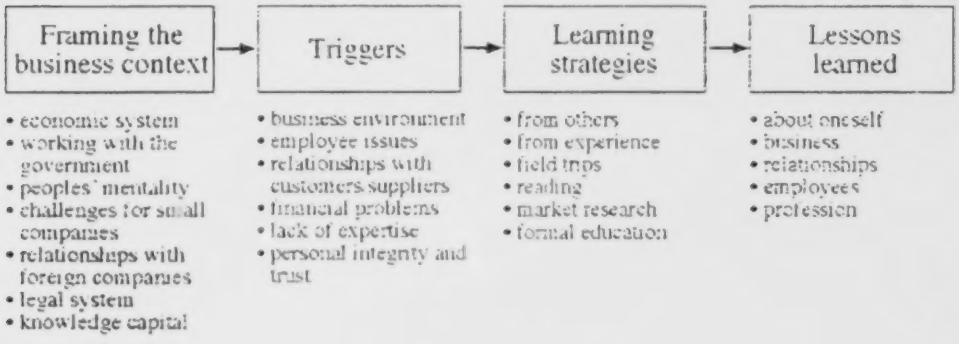

Figure 1. Contribution of the study to the theoretical framework

Both Weber (1985) and Miles and Huberman (1994) contend that the reliability of human coders should be assessed. Intercoder reliability is suggested to assess the extent to which content classification produces the same results when the same text is coded by more than one coder. This was accomplished in this study with the help of the researcher's major professor, a practitioner in the field, and a doctoral student whose valuable insights helped clarify the category definitions and opened new ways of looking at the themes.

Results and Conclusions

The learning of the owner-managers was stimulated mostly by the ambiguity of a quasi-market economy. This study sheds light on what a critical impetus to learn it is for owner-managers of small private companies when state and privately owned companies coexist in the same market, a market which was centrally planned and completely dominated by state-owned companies and institutions for over forty years in Romania and since 1990 it is slowly transforming into a free market environment. This specific, unprecedented transformation characterized by instability and uncertainty adds a new dimension to the complexity of learning by doing when even banks, suppliers, and border guards, to name just a few, are not predictable and shows that there is still a long way to a well defined market oriented environment. The findings of this research showed that the managers participating in this study learn mostly informally what they need to know in order to run their businesses and that courses offered by Western trainers, although interesting, were not valuable to them as the concepts were not embedded in the country's context.

The critical importance of the social, political and economic context to learning. The lenses through which managers saw their world framed their critical incidents and learning experiences. All the managers participating in this study gave detailed accounts of their perception of the economic, political and social context in

which they worked and their learning experiences were all embedded in this context. The fact that 111 data strips represented by sentences or phrases emerged from the data as related to the managers' business context strengthens the argument that learning is embedded in the context of the learner and that triggers of learning are selected based on this framing of the business context. One of the most frequently mentioned themes of the seven themes which form this category, was framing the business context in terms of the economic system (no help from the banks, the impact of high inflation and high taxes, uncertainty and instability) followed by framing the business context in terms of working with the government and state-owned-companies (no help and support from government and problems in dealing with state-owned companies). P7 described this instability in the following way:

> Well, this is the cancer of the Romanian society - instability - you don't know what tomorrow will bring, you have no idea. Eh, you don't know what will happen tomorrow, I will die, my business will be taken away, another government will come that will do things differently. People are afraid. There is no such thing as security, stability as it is in developed countries where tomorrow will be like today or a little bit worse or a little bit better, but there is a stable environment. If I open a business I do it thinking that my son will have a chance to take over and hopefully his son will be also there, but here, here it is not possible. (p. 7)

The economic system and the government institutions in place offered very little support or sometimes even seemed to raise barriers in the way of the small private businesses. Speaking about the helplessness in front of all the barriers raised by the government to keep private companies at bay, P17 described how:

> You have moments when you just want to quit. When you run into so many obstacles and so many people are slowing you down even though you want to do something good, nobody wants to help you, quite to the contrary...You have people from urban development, from constructions, from telecommunications, and on, and on, all requiring signatures and they have a kind of envy thinking that you have money to build a factory and they don't have money to buy a car for example...I don't understand, is this the future? For a better society you ought to help people with initiative to do something. Why delay them? And unfortunately we all run into these things. (p. 11)

Framing the business context in terms of people's mentality (old [regime] mentality/business work ethic of employees, managers, and people in general) was another major theme derived from the managers' accounts. P10 described his problems caused by his employees' old mentality in the following way:

> I had to explain to my workers, that those times when you could take home a reel of thread, or anything else is over [referring to some habits in the old regime], and now if you take something, you take it from the private property of somebody. Unfortunately in the 'old times' people got used to that, nobody can deny that,...so people took home anything available just to supplement their income...But to change people's mentality is the hardest thing to do...Time and education is needed, just like the communist system developed in fifty years its own kind of people. I am not saying that fifty years are needed to change people but at least a minimum of twenty five years is needed to develop a new generation who can really live and work in a democratic society. (pp. 1-2)

Framing the business context in terms of challenges for small companies and their managers (lack of resources and market realities, the professional challenge) was another theme echoed in the managers' stories. The account of one of the managers from team P11 eloquently presented the challenges of some of the entrepreneurs in this unprecedented turbulent context in the following passage:

> In my opinion the biggest problem in this transitional period was that people needed to change profiles, to forget their old specialty and learn a new one. In fact, we also went through this. We had our specialty, probably it would still be our source of living if Ceausescu were alive, and we were forced to forget it and learn a new one plus the management part of it. I believe this is a big problem and everybody had to go through it. It's hard to explain it. In the past there were no unemployed people on paper, but there were inside the gates. They had no work at the workplace. They didn't do anything, because they didn't know or didn't want to. They got paid anyway. So, it was unemployment inside the gates. In these days it's getting harder and harder to do that. People

> are forced to change profiles, or in some cases to learn a totally new specialty. The transition is still going on. (pp. 7-8)

The managers perceived their context in its larger entity by emphasizing the whole political, economic, and social context in which they conducted their activities more than the internal context of their own organizations. Deriving from the managers' accounts of their context, this is understandable in an environment where rules and laws are continuously changing and where government institutions try to find their identity in a new order of things. The context was sometimes interpreted as a macro level trigger of critical incidents, as a barrier in finding solutions to their problem, or sometime as offering potential opportunities. Thus, the framing of the context emerged as a critical dimension in this study and permeated every phase of the learning process.

Enhancing the Meaning of Triggers of Learning, Learning Strategies, and Lessons Learned

The thick, rich descriptions of learning incidents offered by the studied owner-managers enhanced the meaning of these three components of the model. Ninety four triggers, the stimulus that initiates the managers' process of learning, were identified as presented in Figure 1. All of these triggers arose from specific contextual situations perceived as unsolvable at that time by the managers. From this point of view, the nature of these triggers is not different from that presented by Watkins and Marsick (1992) and Marsick and Watkins (1990, 1997). In several studies (Marsick and Watkins, 1990; Howe, 1991; Kops, 1993; Lessard, 1994; Villinger, 1996; Simon and Davies, 1996) triggers of learning were not specifically discussed as it was implied that learning experiences were embedded in the changing organizational context. In the few studies where triggers were analyzed (Akin, 1987; McCall, Lombardo and Morrison, 1988; Dechant, 1989; Mumford, 1993; Ellinger, 1997), they were mostly related to the internal context of the managers' organization (e.g. first supervisory job, new project/task force assignments, problem solving within a group, line-to-staff switching, starting from scratch, business mistakes, subordinate performance problems). Most of the triggers in this study were embedded in the external context of the managers' companies while only a few of them were related to the internal context of the company. Thus, this study expands on the findings of studies describing triggers of learning experiences in the literature.

One hundred seventy seven learning strategies, defined as the methods used by the owner-managers to go about learning to deal with their critical incident, were also identified as presented in Figure 1. The managers' learning strategies were informal and incidental in nature and expanded the findings regarding learning strategies in the literature by shedding light on some of the same strategies, but used in a context of radical political, economic and social change. One of the learning strategies frequently mentioned in the literature was learning from a mentor (Akin, 1987; McCall, Lombardo and Morrison, 1988; Lewis, 1995). This learning strategy was not mentioned at all by the managers in this study which might be explained by the unprecedented change in the environment in which these managers conduct their activities where everybody is trying to learn the new rules of the game amidst the old rules still in place.

The 129 lessons learned identified in this study, as presented in Figure 1, also expand on the findings in the literature. The managerial studies conducted in the United States and Western Europe addressed the issue that managers should continually adapt their strategies, tactics, systems and behaviors to remain effective in their changing environments. The assumption was that those managers already had not only the basic knowledge of how to run a business or a department in a market economy, but also managerial experience on which to rely in that economy. In this study that assumption did not hold as most of the managers started from "grass roots" and first had to learn the basics of conducting and organizing a business in a radically changed environment. Thus, the findings paint a different view of similar lessons as embedded in their context and, by this, expanding their meaning.

One of the major lessons learned by the owner-managers participating in this study was that although many changes took place since the collapse of the communist regime, little has been changed in the way human relationships in conducting businesses were governed. Thus, those managers who did not have managerial experience in the previous regime had to learn how to work with the government and state-owned companies while those who had previous experience did not have a chance to forget or unlearn previous practices. Managers also learned that it will take time until the mentality of the majority of people will change in order for them to understand the way a market economy evolves and works. It will take time until the new rules of the game will take over the old ones and new relationships between businesses and their customers and suppliers will be forged based on ethical principles.

Implications for Research and Practice

The findings of this research show that the managers participating in this study learn informally what they need to know in order to run their businesses and that courses offered by Western trainers, although interesting, were not valuable to them as the concepts were not embedded in the country's context. According to Nonaka and Takeuchi (1995), tacit knowledge deriving from close familiarity with the Central and Eastern European context could be of utmost value for Western partners who lack this familiarity and sureness of touch, yet it could easily be unrecognized or dismissed as inappropriate by those who assume that their competence is necessarily superior. For global human resource development practitioners the findings of this study show how critical it is to invest the time in understanding the historical, political and social dimensions of the country in which the interventions will take place. The learning accounts of managers in this study also shed light on ways of learning when few resources (e.g. financial, technological, educational) are available to support learning. Thus, this study may help practitioners faced with tight resources craft innovative ways to learn and develop training and development programs.

The findings of this study extend Marsick and Watkins (1990, 1997) and Watkins and Marsick's (1992) theoretical framework and model of informal and incidental learning in the workplace. As the authors' framework and model was developed based on empirical research in the United States and Western Europe, which enjoy political and social stability and, in spite of globalization, a relatively stable economy, it did not include the learning models of managers living and working in a volatile political and economic environment. The managers' learning studied in United States and Western Europe was based on already established professionals working in well-defined organizational structures and corporate cultures. The owner-managers in this study and their organizations, the newly-founded small companies in Romania, are witnessing an incubation period when the organizations' structures and culture are developed by trial and error in the same time as the managers' profession is established. This context as well as the owner-manager group which was not represented in the studies on which the model was built contributed to the extension of the model.

During the data analysis process it also became apparent that the language used in Marsick and Watkins' guiding models (1990, 1997) was too abstract or parsimonious compared to the language used by the participants in this study. Although this study added thick description to the three components related to triggers of learning, learning strategies, and lessons learned, the question of "what is not captured in the models" seems worthwhile to explore. Thus, an empirically grounded re-conceptualization of the models into a model which incorporates the learning process as people in this study described them is recommended and it is addressed in another paper.

The learning models of managers operating under the volatile environment of the countries in Central and Eastern Europe deserve further exploration. Global human resource developers can determine how to offer innovative approaches to learning and to create a learning infrastructure to serve the population of managers in this region from studies such as this one. Additional studies addressing how managers learn in companies with different ownership patterns, and the relationship between the learning styles of these managers and the nature of their learning would extend this study. Nevertheless, the portraits given here of the learning of managers facing turbulent change, and a level of constant chaos, chart new territory for management development.

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